

CE/CME Comprehensive Review Report

Tier 3: In-Depth Analysis + Post-Review Strategic Consultation (30 min)

Activity Title	Opioid Stewardship in Ambulatory Care: A Prescriber's Framework
Organization	Greenfield Medical Associates (Fictional Sample)
Activity Type	Live Webinar + Enduring Archive
Accrediting Body	ACCME, Jointly Provided with ACPE
Credit Designation	2.5 AMA PRA Category 1 Credits™ 2.5 CPE Contact Hours
Review Tier	Tier 3: Comprehensive Review
Consultation Session	May 19, 2026 30 Minutes via Video
Reviewer	Dr. Amber Martinez Llanes, EdD, MBA, PMP, SHRM-CP, Prosci

IMPORTANT: This is a sample document for portfolio purposes. All organization names, activity titles, and data are fictional.

Scope of Review & Methodology

Tier 3 is Talent Refinement's most comprehensive CE/CME review offering. It includes a full written compliance and content review, a 30-minute post-review strategic consultation session, and a custom pre-submission checklist delivered at the end of the consultation. This scope is designed for complex activities such as jointly provided credit, multi-format delivery, and first-cycle submissions, where accreditation risk warrants both rigorous written review and real-time strategic planning.

What Was Reviewed

Documents Reviewed	Review Standards Applied
• Activity planning documentation • Faculty disclosure forms and COI resolutions • Learning objectives and competency mapping • Activity agenda and format description • Credit designation statements (ACCME + ACPE) • Post-activity evaluation instrument • Educational need statement with supporting references • Enduring archive implementation plan (draft)	• ACCME Standards for Integrity and Independence (2022) • ACPE Standards 2023: Jointly Provided Activities • ACPE UAN numbering and activity type designation requirements • Jointly provided credit designation language requirements • Profession-specific learning objective standards • Enduring archive independent compliance requirements • ACCME/ACPE joint accreditation agreement terms • Talent Refinement Content Quality Rubric (6-domain)

Review Timeline

Date	Activity	Deliverable
May 5, 2026	Document submission received	Confirmation email sent to program coordinator
May 8, 2026	Written compliance + content review	Full Tier 3 report drafted (this document)
May 19, 2026	Consultation session (30 min)	Session notes + action item list + pre-submission checklist delivered

Executive Summary

COMPLIANCE Substantially Met	CONTENT QUALITY 9.1 / 10	PRIORITY ITEMS 4 Recommendations	STRATEGIC PLAN Completed
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This is a high-quality, clinically rigorous activity with strong educational design and well-documented organizational need. The jointly provided format introduces specific compliance requirements from both ACCME and ACPE that are not yet fully addressed in the submitted materials. The post-review consultation session identified three structural adjustments needed for joint accreditation compliance and developed an implementation plan to address all four recommendations before the scheduled live date.

Strengths • Exceptionally strong educational need documentation with CDC data • Dual-credit format well-structured and clearly differentiated by profession • Faculty expertise is highly credible and appropriately disclosed • Case-based format with real prescribing scenarios drives engagement • Post-activity evaluation is robust and well-designed	Areas for Revision • Joint accreditation credit designation language needs revision for ACPE compliance • Pharmacy-specific learning objectives not differentiated from physician objectives • Activity agenda does not reflect required profession-specific breakout structure • Enduring archive requires separate credit designation statement from live activity
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Section 1: Compliance Review

Evaluated against current ACCME Standards for Integrity and Independence and ACPE Standards 2023 for jointly provided activities.

Criterion	Status	Reviewer Notes
Educational Need Gap documented with supporting data	Met	Robust documentation including CDC opioid prescribing statistics, DEA data, and peer-reviewed literature. Among the strongest need statements reviewed this cycle.
Learning Objectives Measurable, learner-centered, profession-specific	Needs Attention	Objectives are well-written but apply to all learners equally. Joint accreditation requires that pharmacy-specific objectives be separately identified for ACPE compliance. Revise to differentiate physician vs. pharmacist/pharmacy technician objectives.
Joint Credit Designation Dual credit language meets ACCME + ACPE standards	Needs Attention	Credit statements combine both professions in one designation block. ACPE requires separate, standalone designation language for pharmacy credits including ACPE UAN number, activity type designation (knowledge or application), and pharmacist vs. pharmacy technician differentiation.
Commercial Independence Activity free from commercial bias	Met	No commercial support received. Content reviewed for promotional language; none identified. Faculty disclosures confirm no relevant financial relationships for this activity.
Activity Agenda Format reflects profession-specific requirements	Needs Attention	Joint accreditation activities require documentation of how each profession's learning needs are addressed. Current agenda treats all participants as a single learner group. Add brief narrative or table showing how content addresses physician vs. pharmacist competencies.
Enduring Archive Archive meets separate compliance requirements	Needs Attention	The planned enduring archive requires its own credit designation statement, activity planning documentation, and separate disclosure review. These cannot be assumed from the live activity submission.
Evaluation Plan Assessment mechanism appropriate for dual audience	Met	Post-test and participant evaluation are well-designed. The profession-specific case questions appropriately differentiate learning application by role.
Disclosure Faculty COI process complete and learner-accessible	Met	All faculty disclosures complete, documented, and available to learners within the activity platform prior to content access.

Section 2: Content Quality Assessment

Assessment Area	Score	Reviewer Notes
Content Accuracy & Currency	10/10	All content reflects current CDC, FDA, and DEA guidelines. References are within the 3-year window appropriate for a rapidly evolving clinical area. Zero inaccuracies identified.
Alignment to Identified Need	9/10	Strong alignment throughout. The prescribing framework maps directly to the documented gap in opioid management competency. Minor: Module 4 introduces content not directly connected to the stated objectives.
Clarity & Readability	9/10	Content is exceptionally well-organized. Clinical language is appropriate for the target audience. Visual aids in Modules 2 and 3 significantly enhance comprehension.
Instructional Design	9/10	Adult learning principles well-applied. Profession-specific case scenarios are realistic and appropriately complex. Suggest adding a brief self-assessment at the activity open to activate prior knowledge.
Bias & Balance	9/10	Content is balanced and free from commercial influence. Multiple treatment approaches presented. Equitable patient population representation across case scenarios.
Learner Engagement	9/10	High-quality case studies drive active processing. Interactive polling questions in the live format are well-timed. Recommend adding one reflection prompt per module for the enduring archive version.
OVERALL CONTENT SCORE	9.1	Exceptional content quality. Among the highest-scoring activities reviewed in this accreditation category. Compliance revisions are structural and do not reflect on content quality.

Section 3: Priority Recommendations

Recommendations are listed in priority order and reflect findings from both the written review and the strategic consultation session.

#	Priority	Recommendation	Required Action & Owner
1	High	Revise ACPE credit designation to include UAN number, activity type, and profession-specific differentiation	Activity director + ACPE compliance contact. Revise before submission. Confirmed in consultation as the highest-risk item.
2	High	Add profession-specific learning objective set for pharmacists and pharmacy technicians	Faculty lead + instructional designer. Minimum 2 pharmacy-specific objectives required. Due 5 business days before submission.
3	High	Update activity agenda to document profession-specific learning pathway	Activity director. Add a one-paragraph narrative or structured table showing how content addresses both physician and pharmacist competencies.
4	Medium	Begin enduring archive planning as a separate compliance submission	Program coordinator. Archive cannot assume live activity approval. Separate planning form and credit designation required. Discussed in follow-up session.

Section 4: Consultation Session Summary

The following documents key discussion points, findings, and decisions reached during the 30-minute post-review consultation session held May 19, 2026.

Topic	Key Finding	Decision / Next Step
Joint Accreditation Structure	Organization had used joint accreditation language from a previous cycle (pre-2022 standards). Several requirements have changed.	Reviewer provided updated ACPE language template. Activity director will revise credit block by May 16.
Pharmacy Objectives	No pharmacy-specific objectives existed. Faculty had not distinguished prescriber vs. pharmacist application in content design.	Faculty lead agreed to develop 2 pharmacy-specific objectives mapped to Module 3 case scenarios. Reviewer provided sample objective language.
Agenda Structure	Organization was unaware that joint accreditation required explicit documentation of profession-specific learning pathways.	Reviewer provided sample agenda narrative template. Activity director will update agenda document by May 15.
Enduring Archive	Organization planned to post archive without separate compliance review, assuming live approval transferred.	Clarified that archive requires independent review. Discussed scope and confirmed this can be submitted as a separate Tier 1 review after live activity.
Future Submission Process	Organization expressed interest in improving internal QA process for future submissions.	Reviewer agreed to provide a pre-submission checklist tailored to jointly provided activities as part of the follow-up session deliverable.

Section 5: Follow-Up Session Summary

The 30-minute follow-up session was held May 22, 2026. The following items were confirmed as complete or in final review.

Item	Status	Confirmed By
ACPE credit designation language revised with UAN and profession differentiation	Complete	Activity Director
Pharmacy-specific learning objectives added and reviewed	Complete	Faculty Lead
Activity agenda updated with profession-specific pathway documentation	Complete	Activity Director
Pre-submission checklist delivered to organization	Complete	Reviewer
Enduring archive scope confirmed as separate Tier 1 submission	In Progress	Program Coordinator

Appendix A: Pre-Submission Checklist: Jointly Provided Activities

This checklist was developed specifically for Greenfield Medical Associates based on findings from this review. It is designed for internal use prior to submitting any jointly provided CE/CME activity to ACCME or ACPE. Complete all items before submission to reduce compliance risk.

Section A: Joint Accreditation Structure

✓	Checklist Item	Owner
☐	ACPE UAN number assigned and included in credit designation statement	Compliance Contact
☐	Credit designation separately stated for physicians (AMA PRA Category 1) and pharmacists/pharmacy technicians (ACPE)	Activity Director
☐	Activity type designation confirmed (knowledge = .0; application = .04) and reflected in UAN	Faculty Lead
☐	Joint accreditation agreement on file and referenced in planning documentation	Program Coordinator
☐	Organization's jointly provided accreditation status confirmed as current for this submission cycle	Compliance Contact

Section B: Learning Objectives & Competency Mapping

☐	Physician-specific learning objectives written in measurable, behavioral terms (e.g., 'will be able to...')	Faculty Lead
☐	Separate pharmacy-specific learning objectives written and differentiated from physician objectives	Faculty Lead
☐	Each objective maps to at least one content element in the activity	Instructional Designer
☐	Objectives reviewed for absence of commercial bias or product-specific language	Compliance Contact
☐	Pharmacy technician objectives differentiated from pharmacist objectives if both receive credit	Faculty Lead

Section C: Commercial Independence & Disclosure

☐	All faculty disclosure forms complete and COI resolutions documented before content development	Compliance Contact
☐	Disclosure information accessible to learners at point of entry (before content begins)	Program Coordinator
☐	Content reviewed for promotional language, trade names without generic equivalents, and unsupported claims	Faculty Lead
☐	No commercial support received, or commercial support agreement on file and	Activity Director

	compliant with ACCME SII	
☐	Planners with relevant financial relationships identified and managed per ACCME standards	Compliance Contact

Section D: Enduring Archive (If Applicable)

☐	Archive treated as a separate activity with its own credit designation and planning documentation	Activity Director
☐	Separate ACPE UAN assigned for enduring version if pharmacy credit is offered	Compliance Contact
☐	Post-test, evaluation, and completion mechanism appropriate for self-paced format	Instructional Designer
☐	Archive content reviewed for currency; update schedule to be established	Faculty Lead
☐	Archive compliance review submitted as a separate activity to accrediting body before launch; treat as new submission	Program Coordinator

This checklist is a Tier 3 deliverable customized to this organization's accreditation structure. It is not a substitute for official ACCME or ACPE guidance. For questions, contact Talent Refinement at info@talentrefinement.com.

Reviewer Attestation

This comprehensive review was conducted independently across written review, strategic consultation, and follow-up sessions. The reviewer has no financial or personal relationship with the submitting organization that would constitute a conflict of interest.

Reviewer Dr. Amber Martinez Llanes EdD (Curriculum & Instruction) MBA PMP SHRM-CP Prosci Certified Certified Executive & Organizational Development Coach	Contact Talent Refinement, LLC info@talentrefinement.com www.talentrefinement.com Initial Review: May 8, 2026 Consultation Session: May 19, 2026
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